

2008 RESIDENT STUDY

Prepared for
Community Associations of The Woodlands

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Objectives

Objectives

- The major objective of this research project is to obtain resident opinions on various issues related to living in The Woodlands, including:
 - Satisfaction with available services;
 - Issues of priority;
 - Satisfaction with delivery of services;
 - Use of existing community facilities and amenities;
 - Identifying any changes occurring since the 2005, 2004, 2002, 2001, 2000 and 1999 Residents Surveys where appropriate.

Methodology

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Methodology

- CCR conducted 1,022 interviews with residents of The Woodlands
 - Alden Bridge N=214
 - Cochran's Crossing N=170
 - Grogan's Mill N=170
 - Panther Creek N=153
 - Sterling Ridge N=105
 - Indian Springs N=104
 - Harper's Landing N=73
 - College Park N=16
 - Creekside N=10
 - Town Center N=3
 - Carlton Woods N=2

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Methodology

- Requirements for participation:
 - Currently reside in one of pre-listed villages in The Woodlands
 - Head of household
 - Currently reside in a single family dwelling
 - Respondent/family/household members do not work in:
 - Market Research
 - Advertising
 - Public Relations
 - Respondent/family/household members have never served on the Board or been employed by any of the Associations

Methodology

- Respondents were randomly called from sample provided to CCR by the Community Associations of The Woodlands management
 - Respondents informed of the study sponsor
 - Given a telephone number to call with any questions
 - Interviewing dates: September 10, 2008 to October 25, 2008
 - Interviewing was suspended for a period due to Hurricane Ike recovery

Methodology

- CCR Responsibilities:
 - Design questionnaire
 - Conduct interviewing from CCR Houston call center
 - Validate surveys
 - Data processing and analysis
 - Significance testing
 - 95% confidence level for responses of 30 or greater
 - Performed for current year (2008) versus previous year (2005) results only in comparison section

Methodology

- Marks of significance seen throughout the report are as follows unless otherwise noted:
 - “**”--Significantly greater than all others in category
 - “+”--Significantly different from 2005 results
 - “P”--Significantly different from Panther Creek
 - “G”--Significantly different from Grogan’s Mill
 - “C”--Significantly different from Cochran’s Crossing
 - “I”--Significantly different from Indian Springs
 - “A”--Significantly different from Alden Bridge
 - “S”--Significantly different from Sterling Ridge/Carlton Woods
 - “H”--Significantly different from Harper’s Landing/College Park
- Significance testing was not performed for other areas due to small base sizes

Respondent Profile

CHART
1 OF 2

2008 Resident Survey

	TOTAL SAMPLE (N=1022)	Alden Bridge (N=214)	Cochran's Crossing (N=170)	Grogan's Mill (N=170)	Panther Creek (N=153)	Sterling Ridge/ Carlton Woods (N=105)	Indian Springs (N=104)	Harper's Landing/ College Park (N=89)	All Other (N=17)
GENDER									
Male	32%	32%	32%	34%	30%	30%	29%	40%	47%
Female	68%	68%	68%	66%	70%	70%	71%	60%	53%
AVERAGE RESPONDENT AGE	51	50	54	56	55	46	52	44	48
AVERAGE HOUSEHOLD INCOME	\$122,330	\$119,620	\$135,410	\$106,820	\$117,880	\$141,790	\$128,140	\$107,880	\$154,170
OWN CURRENT RESIDENCE	98%	99%	98%	97%	98%	99%	98%	98%	100%
AVERAGE NUMBER OF YEARS LIVED IN THE WOODLANDS	11	8	12	17	15	4	9	5	6
AVERAGE NUMBER OF PEOPLE IN HOUSEHOLD	3	3	3	3	3	4	3	3	3
AVERAGE NUMBER OF CHILDREN IN HOUSEHOLD	1	1	1	0	1	2	1	1	1
AVERAGE NUMBER OF PEOPLE IN HOUSEHOLD WORKING IN THE WOODLANDS	1	1	1	1	1	1	1	1	0

Q1./Q42-Q51.

Quotas set for gender and village

CCR

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Respondent Profile (continued)

CHART
2 OF 2

2008 Resident Survey

	TOTAL SAMPLE (N=1022)	Alden Bridge (N=214)	Cochran's Crossing (N=170)	Grogan's Mill (N=170)	Panther Creek (N=153)	Sterling Ridge/ Carlton Woods (N=105)	Indian Springs (N=104)	Harper's Landing/ College Park (N=89)	All Other (N=17)
MARITAL STATUS									
Married	85%	86%	91%	78%	81%	89%	88%	89%	88%
Single	5%	6%	2%	8%	7%	6%	2%	2%	0%
Separated/Divorced	4%	5%	2%	6%	5%	2%	3%	7%	6%
Widowed	4%	3%	4%	6%	5%	4%	6%	1%	0%
HIGHEST LEVEL OF EDUCATION									
High school or less	5%	4%	2%	6%	5%	5%	9%	4%	6%
Some college	18%	19%	16%	23%	19%	10%	20%	19%	0%
Bachelor's degree	43%	47%	41%	41%	38%	51%	40%	43%	53%
Some post graduate	7%	5%	10%	7%	8%	1%	7%	4%	12%
Post graduate degree	26%	24%	29%	21%	27%	31%	22%	28%	24%

Q47./Q48.

CCR

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Total Sample Dialing Information

Disposition	# Dialings	% of Total Dialings
No Answer	3,570	16.28
Busy	335	1.53
Answering Machine	9,488	43.27
Wrong Number	290	1.32
Generic Call Back	309	1.41
Disconnect	2,388	10.89
Appointment Call Back	1,465	6.68
Initial Refusal	2,007	9.15
Terminate in Middle	23	0.1
Language Barrier	48	0.22
Fax/Modem/Business	355	1.62
Qualified Refusal	37	0.17
Call block/blocked number	43	0.2
Over quota	289	1.32
Complete	1,022	4.65
Terminate - Not male/female head of household	9	0.04
Terminate - Not Woodlands resident	31	0.14
Terminate - Do not live in a house	58	0.26
Terminate - Security screen	123	0.56
Terminate - Do not live in listed village	37	0.17
TOTAL DIALINGS	21,927	
2008 RATIO OF TOTAL DIALINGS TO COMPLETED SURVEYS	21:1	
2005 RATIO OF TOTAL DIALINGS TO COMPLETED SURVEYS	13:1	
2004 RATIO OF TOTAL DIALINGS TO COMPLETED SURVEYS	16:1	
2002 RATIO OF TOTAL DIALINGS TO COMPLETED SURVEYS	11:1	
2000 RATIO OF TOTAL DIALINGS TO COMPLETED SURVEYS	10:1	
1999 RATIO OF TOTAL DIALINGS TO COMPLETED SURVEYS	9:1	

Conclusions & Recommendations

Conclusions

- The Woodlands residents continue to be pleased with living in The Woodlands due to the overall atmosphere
 - The focus on the surrounding, cleanliness, and various entertainment venues are the primary components that make the atmosphere a bonus
 - Most express that the Associations continue to do a good job and that they receive good value for their assessments
 - Contact with the Associations is favorable
 - Residents are satisfied with the responses they receive from the Associations' staff
 - Customer service in key areas such as professionalism has improved from the last wave
 - Deed restriction enforcement is effective and important to enforce for most residents
- In general, residents feel safe everywhere except on pathways

Conclusions

- Residents' communications with Associations staff are productive and favorable
 - Although the Internet continues to increase as a source for community news, residents still strongly rely on local print options such as The Villager and The Woodlands Magazine
 - Residents communicate with the staff using various forms—phone, email, and in person

Conclusions

- The general opinion is that residents enjoy their hometown feel and they want to maintain this atmosphere
- Although they are satisfied overall and enforcement (such as traffic) has improved, many still want even better enforcement of rules
 - They still rate traffic enforcement lowest in relation to other services and name traffic as a major issue
 - Residents want to continue paying for enhanced law enforcement
 - Neighborhood watch is a lower rated service as well
 - Safety and security remain a top-mentioned concern
 - Deed restriction enforcement rates lower even though many say enforcement is about right
 - Although economic development is welcome, residents appear to want to be sure it is regulated; they worry about over-population

Conclusions

- In general, the villages are very similar in opinions; however there are some differences to note:
 - Overall, Alden Bridge and Cochran's Crossing appear to experience the greatest satisfaction with living in their area
 - Harper's Landing/College Park rate services lower than other communities, in general, especially traffic,
 - Indian Springs residents seem more concerned with general safety and traffic issues than other communities
 - Safety on pathways seems a greater a concern for Panther Creek residents
 - Feeling safe at The Woodlands Mall is a concern more for Grogan's Mill and Harper's Landing/College Park residents than residents of other communities

Conclusions

- Deed restriction enforcement is effective in Grogan's Mill, Sterling Ridge, and Cochran's Crossing according to their ratings in this category
 - However, Panther Creek enforcement can be improved
- Email is catching on as a preferred form of communication with staff in the Indian Springs and Sterling Ridge/Carlton Woods neighborhoods
- Although The Villager and the Woodlands Magazine are used equally, Cochran's Crossing, Panther Creek, and Grogan's Mill appear to prefer The Villager and Sterling Ridge/Carlton Woods, Indian Springs, and Harper's Landing/College Park favor The Woodlands Magazine
 - Sterling Ridge rates the magazine very effective more than other communities
- Economic development seems a priority in Sterling Ridge/Carlton Woods and Harper's Landing/College Park

Recommendations

- The primary challenge facing the Associations' during times of growth and development is how to maintain the aspects residents value about living in The Woodlands
 - Traffic congestion: Traffic is an inherent problem with growth and the Associations need to continue to help alleviate this issue. Encouraging telecommuting, carpooling, or flexible work schedules among Woodlands businesses may be options.
 - Development: Most welcome economic development, but the Association needs to be aware of and plan for the burdens that accompany growth. Increasing patrols and maintaining high standards in terms of deed restrictions and zoning laws is necessary. Also, promote the efforts made to partner with local law enforcement to address traffic issues.

Recommendations

- Safety: Continue to strengthen grassroots efforts that help create a sense of security, such as neighborhood watches, neighborhood night-outs, or walking clubs.
- Contact: Continue to improve residents' contact with Associations staff. Reinforce the methods residents can use to contact staff—face-to-face, phone, and email.
- Entertainment: As The Woodlands develops, existing venues become strained, so new/more restaurants and other activities are necessary. Offer incentives to businesses that add to the family, hometown atmosphere, such as restaurants, bounce houses, and nature parks.

Research Findings 2008 Results

Community Services

Community Assessment Rate/Services

- Overall, residents are satisfied with the services provided by the Community Associations
 - All but two services rate a 4 or 5 on a 5-point scale by at least 70% of the residents
 - Eighty-eight percent rate the Associations as good to excellent in terms of services provided
 - Sixty-nine percent rate value for the money of the assessment rate as Excellent/Very good/Good
 - The best rated services are Parks and Open Spaces, Garbage Collection, and Pathways
 - The lowest rated services are Traffic Enforcement, Neighborhood Watch, and Deed Restriction Enforcement

Rating Community Services (1 = Poor; 5 = Excellent)

2008 Resident Survey

	TOTAL SAMPLE (N=1022)	Alden Bridge (N=214)	Cochran's Crossing (N=170)	Grogan's Mill (N=170)	Panther Creek (N=153)	Sterling Ridge/ Carlton Woods (N=105)	Indian Springs (N=104)	Harper's Landing/College Park (N=89)	All Other (N=17)
Fire Services	4.58	4.58	4.55	4.68	4.65	4.58	4.57	4.34 A,C,G,P,S	4.27
Parks and Open Space	4.50	4.57	4.53	4.47	4.51	4.56	4.52	4.27 A, C, P, S, I	4.47
Emergency Medical Services	4.47	4.51	4.44	4.50	4.53	4.40	4.44	4.42	4.30
Swimming Pools	4.37	4.46 G,H	4.39	4.18	4.48 G,H	4.49 G,H	4.36	4.20	4.15
Pathways	4.33	4.46	4.46	4.30 A	4.33 H	4.32 H	4.23	4.02 A,C,G	4.00
Recreation Facilities	4.33	4.30	4.39	4.17 P,S,C	4.47 A,H	4.45 H	4.28	4.16	4.53
Garbage Collection	4.32	4.39	4.33	4.39	4.41	4.36	4.23	3.99 A,C, G, P, S	4.18
Recreation Programs	4.26	4.26	4.32	4.26	4.32	4.32	4.15	4.07	4.21
Recycling Collection	4.17	4.17	4.17	4.21	4.15	4.18	4.19	4.15	3.94
Streetscape Maintenance	4.09	4.13 H	4.25 H,G,P	4.01	4.06	4.13	4.06	3.86	4.06
General Law Enforcement	4.04	4.02	4.07 H	4.21 H,P,S	3.99	3.94	4.09	3.79	4.00
Neighborhood Watch	3.81	3.68	3.86	3.80	3.87	3.95	3.79	3.75	3.58
Deed Restrictions Enforcement	3.79	3.82	3.82	3.80	3.67	3.99	3.85	3.57 S,P	3.87
Traffic Enforcement	3.65	3.60	3.65	3.90 A,C,I,H,P	3.60	3.76	3.48	3.50	3.53

CCR

Q6. Closed-ended rating question

25

Rated Community Services a '4' or '5'

2008 Resident Survey

	TOTAL SAMPLE (N=1022)	Alden Bridge (N=214)	Cochran's Crossing (N=170)	Grogan's Mill (N=170)	Panther Creek (N=153)	Sterling Ridge/ Carlton Woods (N=105)	Indian Springs (N=104)	Harper's Landing/ College Park (N=89)	All Other (N=17)
Parks and Open Space	90%	93%	84%	87%	92%	87%	94%	82%	94%
Garbage Collection	85%	89%	84%	89%	88%	85%	79%	73%	82%
Pathways	85%	92%	88%	82% A	85%	86%	81%	74%	65%
Street Maintenance	77%	80%	82%	75%	75%	73%	76%	68%	6%
Recreation Facilities	79%	78%	81%	71% A	80%	85%	77%	78%	100%
Recycling Collection	78%	77%	80%	76%	76%	83%	78%	72%	70%
Fire Services	73%	75%	77%	79%	73%	70%	66%	67%	53%
Swimming Pools	66%	70%	66%	55% A,C	63%	77%	65%	71%	59%
Recreation Programs	68%	72%	73%	67%	66%	75%	60%	62%	59%
General Law Enforcement	72%	71%	78%	80%	72%	71%	71%	59%	70%
Deed Restriction Enforcement	72%	71%	78%	64%	55% A,C	65%	61%	51%	59%
Emergency Medical Services	69%	66%	73%	68%	70%	70%	70%	65%	53%
Traffic Enforcement	57%	55%	59%	65% A	52% G	61%	50%	57%	47%
Neighborhood Watch	52%	44%	61%	51% A	50% S,C	64%	48% S	51%	42%

CCR

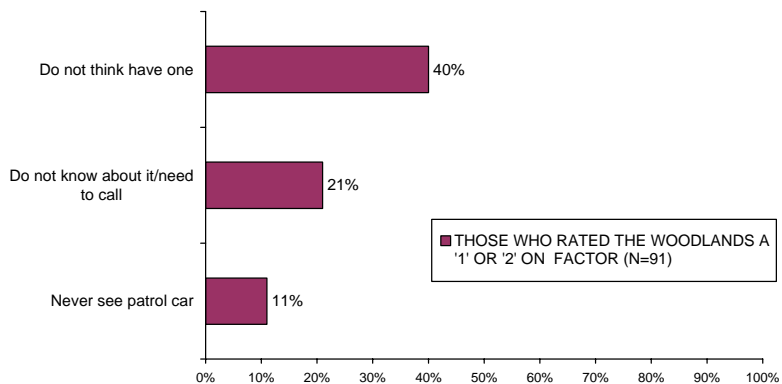
Q6. Closed-ended rating question

26

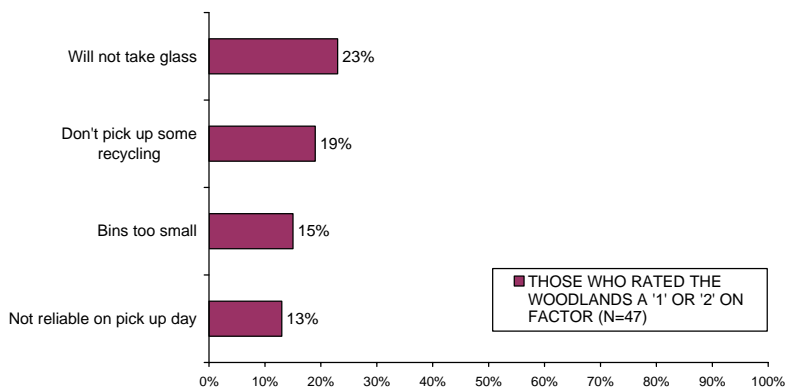
Rated Community Services a '1' or '2'

	TOTAL SAMPLE (N=1022)	Alden Bridge (N=214)	Cochran's Crossing (N=170)	Grogan's Mill (N=170)	Panther Creek (N=153)	Sterling Ridge/ Carlton Woods (N=105)	Indian Springs (N=104)	Harper's Landing/ College Park (N=89)	All Other (N=17)
Traffic Enforcement	13%	15%	16%	8%	14%	9%	17%	20%	18%
Deed Restrictions	9%	9%	10%	10%	9%	6%	10%	10%	18%
Neighborhood Watch	9%	10%	8%	9%	9%	8%	8%	10%	18%
General Law Enforcement	6%	6%	5%	3%	6%	9%	5%	10%	6%
Recycling Collection	5%	6%	4%	5%	4%	5%	4%	2%	6%
Street Maintenance	6%	6%	3%	8%	4%	4%	6%	10%	6%
Garbage Collection	3%	2%	2%	4%	2%	2%	4%	9%	0%
Pathways	2%	1%	1%	3%	1%	3%	2%	6%	0%
Recreation Facilities	3%	3%	3%	5%	1%	1%	3%	2%	0%
Swimming Pools	2%	1%	2%	5%	1%	1%	1%	5%	12%
Recreation Programs	2%	2%	2%	3%	2%	2%	3%	5%	0%
Fire Services	0%	0%	1%	1%	0%	1%	1%	0%	1%
Emergency Medical Services	1%	1%	1%	2%	2%	1%	1%	0%	6%
Parks and Open Space	1%	0%	2%	2%	1%	0%	0%	3%	0%

Reasons Rated Neighborhood Watch as 'Poor'

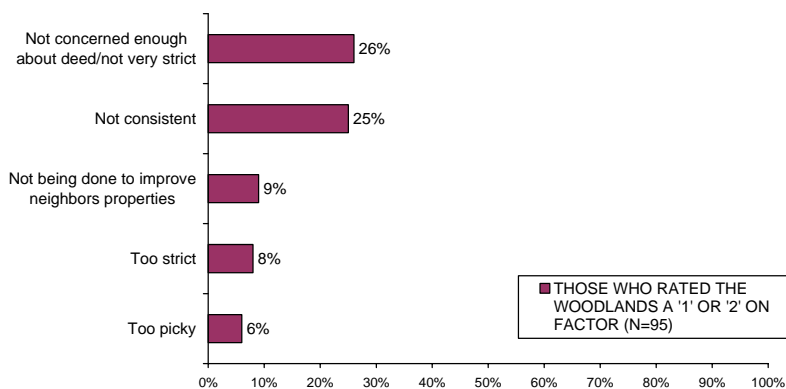


Reasons Rated Recycling Collection as 'Poor'



Q7. Open-ended question

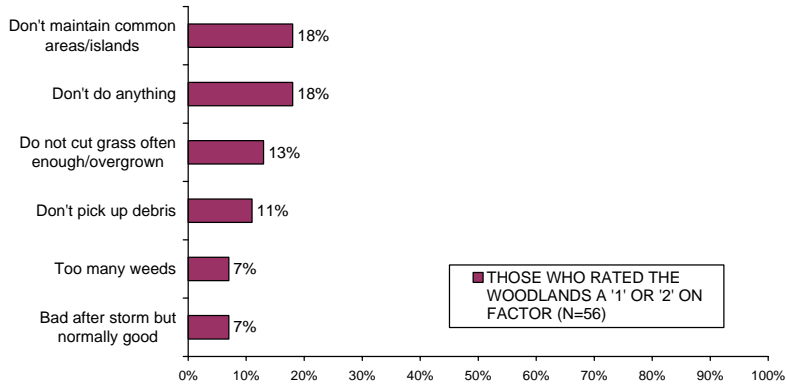
Reasons Rated Deed Restrictions Enforcement as 'Poor'



Q7. Open-ended question

Reasons Rated Street Maintenance as 'Poor'

2008 Resident Survey



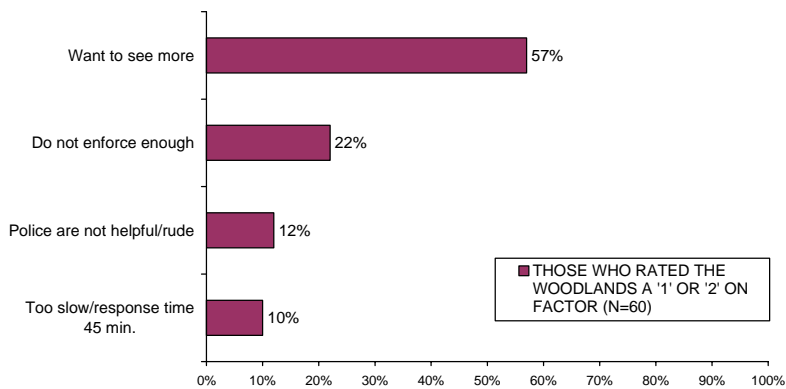
Q7. Open-ended question

CCR

31

Reasons Rated Law Enforcement as 'Poor'

2008 Resident Survey

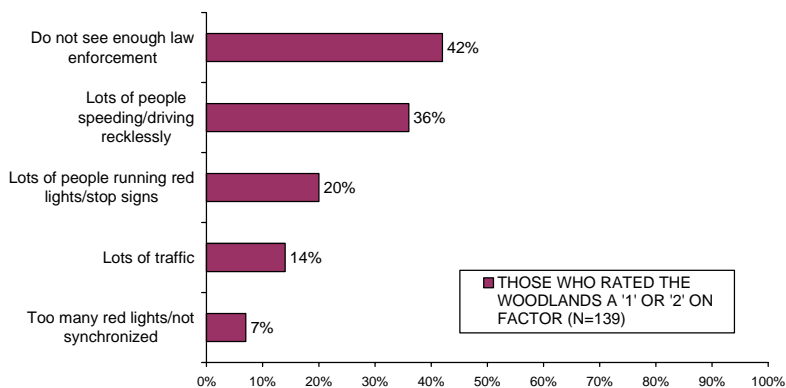


Q7. Open-ended question

CCR

32

Reasons Rated Traffic Enforcement as 'Poor'



Q12. Closed-ended question

Rating Services Provided by Community Associations

	TOTAL SAMPLE (N=1022)	Alden Bridge (N=214)	Cochran's Crossing (N=170)	Grogan's Mill (N=170)	Panther Creek (N=153)	Sterling Ridge/ Carlton Woods (N=105)	Indian Springs (N=104)	Harper's Landing/ College Park (N=89)	All Other (N=17)
Excellent	21%	23%	21%	25%	22%	17%	20%	16%	24%
Very good	41%	40%	44%	39%	41%	46%	38%	42%	53%
Good	26%	27%	25%	21%	26%	23%	35%G	30%	12%
Fair	7%	5%	5%	11%A,C	7%	9%	7%	6%	6%
Poor	2%	4%P,S,I	4%P	2%	0%	0%	0%	3%P	0%

62% Excellent/Very good

Q8. Closed-ended rating question

Rating Assessment Rate Overall in Terms of Value for the Money

2008 Resident Survey

	TOTAL SAMPLE (N=1022)	Alden Bridge (N=214)	Cochran's Crossing (N=170)	Grogan's Mill (N=170)	Panther Creek (N=153)	Sterling Ridge/ Carlton Woods (N=105)	Indian Springs (N=104)	Harper's Landing/ College Park (N=89)	All Other (N=17)
Excellent	10%	11%	8%	9%	15%CSH	4%	15%CSH	4%	6%
Very good	24%	22%	33%API	24%	22%	26%	18%	25%	18%
Good	35%	33%	35%	36%	35%	38%	38%	37%	29%
Fair	22%	24%	17%	25%	20%	27%	22%	21%	35%
Poor	5%	7%	4%	2%	4%	1%	5%	10%CGS	6%

34% Excellent/Very good

Q9. Closed-ended rating question

CCR

35

2008 Resident Survey

Law Enforcement/Safety

CCR

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Traffic Concerns

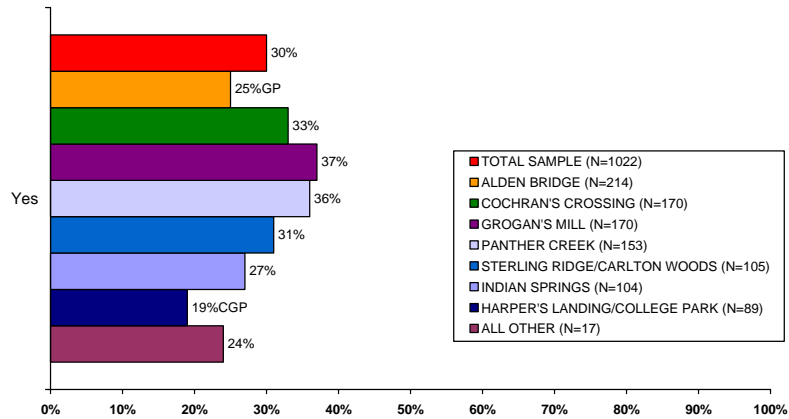
- 30% feel traffic enforcement has improved in the past year
 - 93% of residents feel it is somewhat to very important for the Associations to continue paying for the additional enforcement

Safety Issues

- The Woodlands residents feel safe in most areas
 - They rate safety highest in their neighborhoods during the day and at Market Street
 - However, residents rate safety on pathways lower than the other areas

Has Traffic Enforcement Improved in Past Year?

2008 Resident Survey



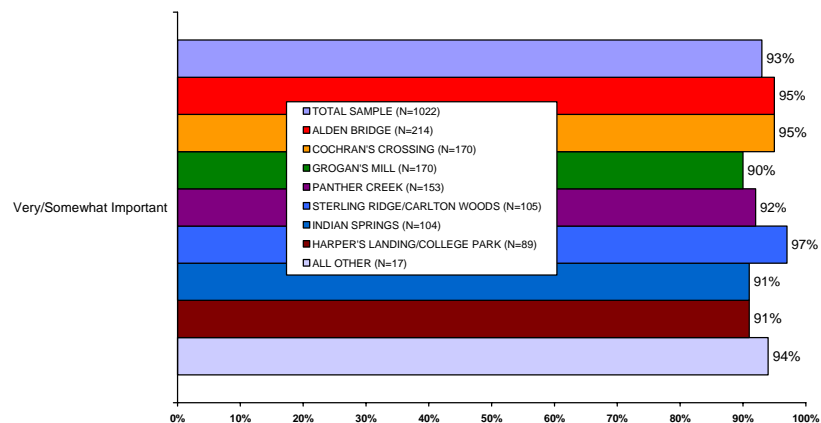
Q10. Closed-ended

CCR

39

Important to Continue Paying within Current Structure for Enhanced Law Enforcement

2008 Resident Survey



Q11. Closed-ended question

CCR

40

Rating Safety Level

(1 = Do not feel safe at all; 5 = Feel very safe)

	In neighborhood during day	At Market Street	At Village shopping center	While driving on roads	At Woodlands Mall	In neighborhood at night	In community parks	On pathways
Total Sample (N=1022)	4.58	4.53	4.40	4.26	4.24	4.16	4.13	3.92
Alden Bridge (N=214)	4.52	4.55	4.43	4.23	4.29P	4.24	4.20	4.03
Cochran's Crossing (N=170)	4.56	4.53	4.44	4.25	4.17	4.16	4.15	3.97
Grogan's Mill (N=170)	4.62	4.62	4.35	4.36	4.36PIC	4.17	4.07	3.90
Panther Creek (N=153)	4.59	4.47G	4.37	4.20	4.10H	4.16	4.11	3.74AC
Sterling Ridge/Carlton Woods (N=105)	4.66A	4.54	4.47	4.36	4.29	4.17	4.19	3.95
Indian Springs (N=104)	4.54	4.45	4.48	4.23	4.14	4.10	4.14	3.92
Harper's Landing/College Park (N=89)	4.58	4.59	4.30	4.12GS	4.36	4.03	4.03	3.96
All Other (N=17)	4.53	4.35	3.93	4.35	3.88	3.88	3.75	3.59

Q12. Closed-ended rating question

Covenants/Deed Restrictions

Deed Restrictions

- Overall, residents are satisfied with the enforcement of deed restrictions
 - 85% indicate that the enforcement of deed restrictions is very or somewhat effective
 - 63% feel that the level of deed restriction enforcement is “about right”
 - 94% feel deed restrictions are somewhat to very important

Effectiveness of Enforcement of Deed Restrictions

	TOTAL SAMPLE (N=1022)	Alden Bridge (N=214)	Cochran's Crossing (N=170)	Grogan's Mill (N=170)	Panther Creek (N=153)	Sterling Ridge/ Carlton Woods (N=105)	Indian Springs (N=104)	Harper's Landing/ College Park (N=89)	All Other (N=17)
Very effective	41%	41%	46%	42%	37%	50%PI	36%	37%	41%
Somewhat effective	44%	47%	41%	38%	44%	48%	51%G	39%	41%
Neither effective nor ineffective	7%	7%	5%	9%S	7%	2%	6%	13%ACS	6%
Not very effective	5%	3%	5%	6%	6%	1%GP	5%	6%	12%
Not at all effective	2%	1%	2%	2%	4%	0%	1%	4%	0%

85% Very/Somewhat effective

Q13. Closed-ended

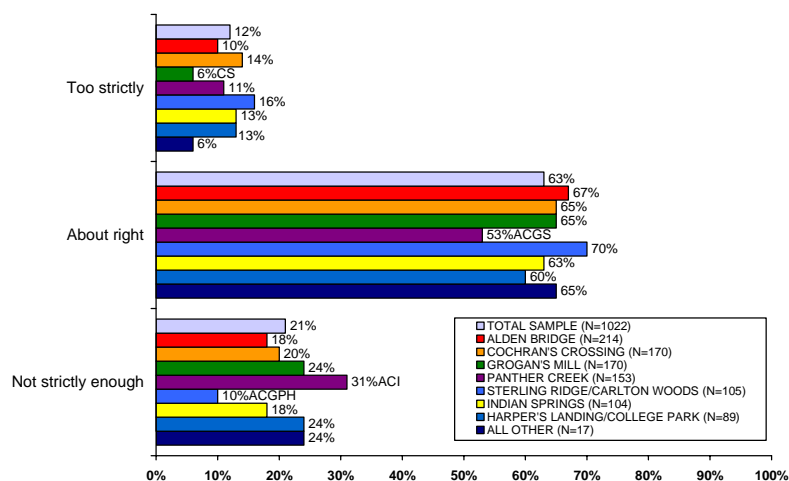
Importance of Deed Restriction Enforcement

	TOTAL SAMPLE (N=1022)	Alden Bridge (N=214)	Cochran's Crossing (N=170)	Grogan's Mill (N=170)	Panther Creek (N=153)	Sterling Ridge/ Carlton Woods (N=105)	Indian Springs (N=104)	Harper's Landing/ College Park (N=89)	All Other (N=17)
Very important	68%	64%	68%	73%	67%	74%	63%	63%	76%
Somewhat important	26%	31%G	24%	21%	30%G	22%	27%	28%	24%
Neither important nor unimportant	3%	3%	4%	4%	1%	3%	4%	6%	0%
Not very important	1%	0%	1%	0%	0%	1%	4%AGP	1%	0%
Not at all important	1%	0%	1%	1%	1%	0%	0%	0%	0%

94% Very/Somewhat important

Q14. Closed-ended

Feel That Deed Restrictions Are Enforced...



Q15. Closed-ended

Deed Restrictions

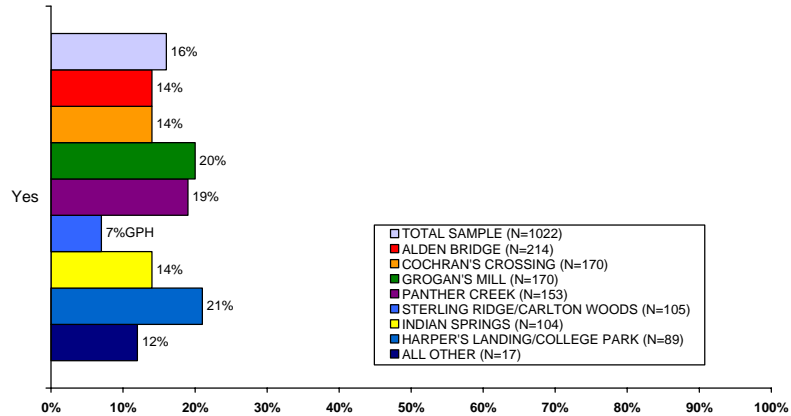
- Fewer than two in ten (16%) have filed a complaint about deed restrictions
 - 48% of the 160 who filed a complaint are satisfied with the Associations' response to their filed complaint
- Twenty-eight percent say they received a letter about a violation
 - Fifty-eight percent of these 285 who received a letter about a violation are satisfied with the response to or resolution of the situation

Deed Restrictions

- Thirty-seven percent applied to make property improvements through the RDRC
 - Most, 84%, of those who applied are somewhat/very satisfied with the Associations' response to this application

Filed Complaint About Deed Restriction in Village

2008 Resident Survey



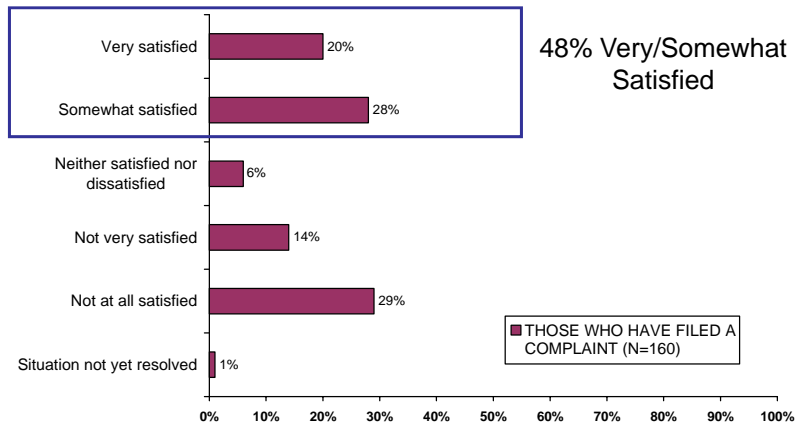
Q16. Closed-ended question

CCR

49

Satisfaction with Associations' Response to Complaint Filed

2008 Resident Survey



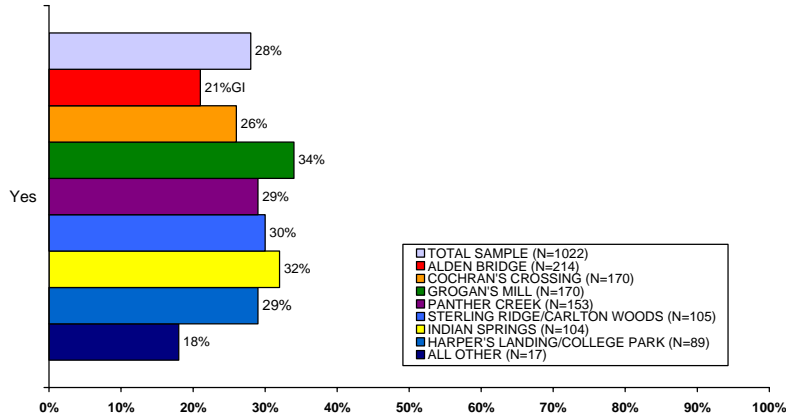
Q17. Closed-ended question

CCR

50

Received Letter About Deed Restriction Violation on Property

2008 Resident Survey

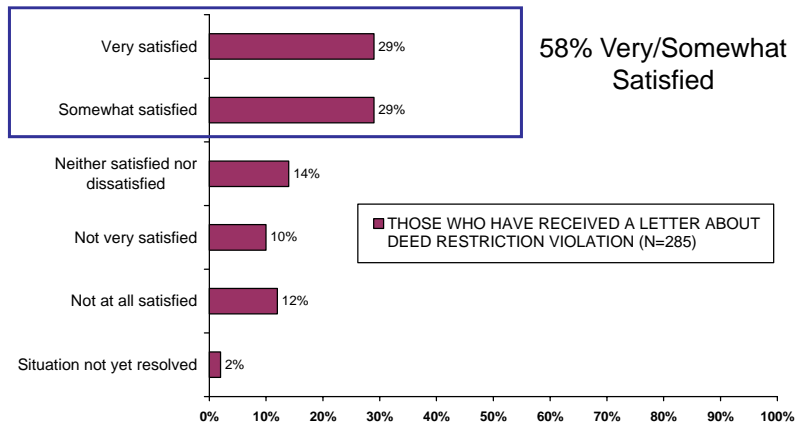


CCR

51

Satisfaction with Associations' Response to and Resolution of Situation

2008 Resident Survey

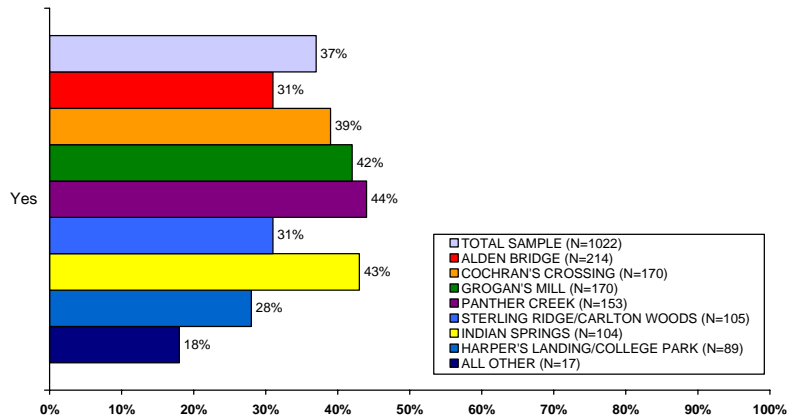


CCR

52

Applied for Property Improvement through RDRC

2008 Resident Survey



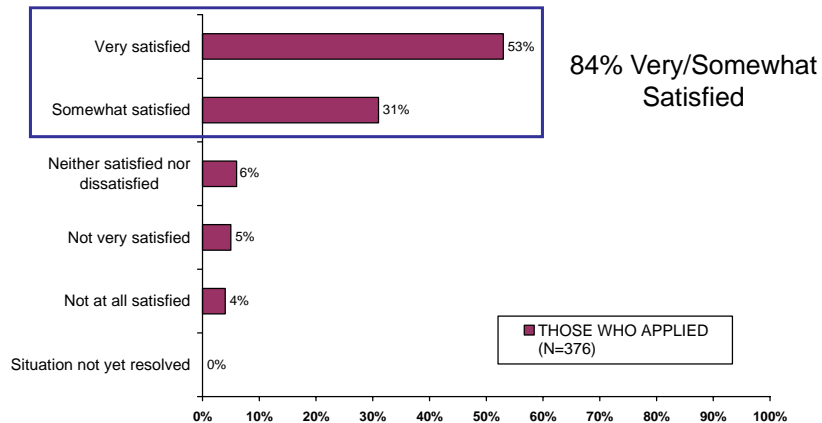
Q20. Closed-ended question

CCR

53

Satisfaction with Associations' Response to Application

2008 Resident Survey



Q17. Closed-ended question

CCR

54

Communications

Methods of Communication

- The Woodlands residents mostly rely on the Internet and print forms of communication to learn about community activities
 - 35% report using The Villager
 - 34% The Woodlands Magazine
 - 19% use E-neighbor or Internet newsletter

How Primarily Learn About Activities in Community

	TOTAL SAMPLE (N=1022)	Alden Bridge (N=214)	Cochran's Crossing (N=170)	Grogan's Mill (N=170)	Panther Creek (N=153)	Sterling Ridge/ Carlton Woods (N=105)	Indian Springs (N=104)	Harper's Landing/ College Park (N=89)	All Other (N=17)
The Villager	35%	29%	43%ASH	44%ASH	50%ASIH	16%	36%H	19%	18%
The Woodlands Community Magazine	34%	41%GP	31%	25%	27%	41%GP	39%GP	43%GP	12%
Neighbors/friends/word-of-mouth	13%	14%	9%	11%	12%	13%	13%	12%	41%
Don't know/unsure	4%	5%	1%	5%	5%	4%	0%	6%	0%
E-neighbor or Internet newsletter	19%	17%	22%	19%	16%	22%	17%	12%	47%
Houston Chronicle This Week	6%	4%	12%ASIH	6%	7%	5%	4%	3%	0%
Email	4%	6%	3%	4%	3%	6%	7%	4%	0%

Q22. Closed-ended question

The Woodlands Community Magazine

- Ninety-five percent receive The Woodlands Community Magazine
 - Of those who recall receiving it:
 - Fifty-six percent read all or most of the contents
 - Eighty percent indicate that the magazine is an effective information source

The Woodlands Community Magazine

2008 Resident Survey

Base: Those who do not hear about community information through magazine	TOTAL SAMPLE (N=674)	Alden Bridge (N=127)	Cochran's Crossing (N=117)	Grogan's Mill (N=127)	Panther Creek (N=112)	Sterling Ridge/ Carlton Woods (N=105)	Indian Springs (N=63)	Harper's Landing/ College Park (N=51)	All Other (N=15)
Receives/Uses The Woodlands Community Magazine	95%	96%	98%AS	90%AS	96%ASH	90%	100%	98%	73%
Base: Those who report receiving the magazine or hearing about community information through it	(N=987)	(N=209)	(N=168)	(N=157)	(N=149)	(N=99)	(N=104)	(N=88)	(N=13)
Typically Reads...									
All of magazine	26%	27%	15%ASIH	22%SIH	23%	35%	36%P	33%	23%
Most of magazine	30%	27%	29%	31%	30%	35%	27%	28%	46%
Some of magazine	36%	37%	44%SI	38%	39%	28%	30%	32%	23%
None of magazine	8%	9%	11%	8%	7%	1%	7%	7%	8%
Magazine effectiveness									
Very effective	40%	38%	37%	36%	33%IH	55%ANGP	44%	45%	46%
Somewhat effective	40%	42%	42%	39%	44%	38%	38%	32%	46%
Neither effective nor ineffective	9%	8%	10%	10%	10%	5%	5%	17%ASI	0%
Not very effective	5%	5%	5%	6%	5%	2%	8%	3%	0%
Not at all effective	3%	5%S	4%	4%	4%	0%	1%	2%	0%

Q23./Q24./Q25. Closed-ended questions

CCR

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2008 Resident Survey

Communication with Associations' Staff

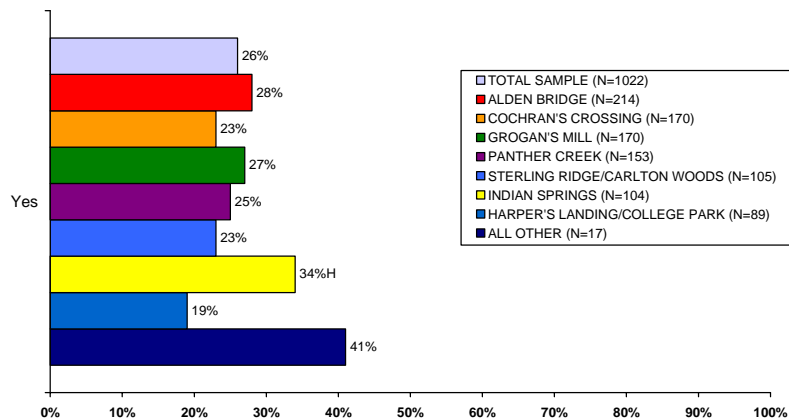
CCR

60

Association Staff

- The Associations Staff provides good service to homeowners
 - In the past 5 years, 26% contacted an Associations Staff Member. The Staff rates somewhat high on all aspects on a 5-point scale with a 5 being 'Excellent':
 - Courtesy: 4.04
 - Professionalism: 3.93
 - Helpfulness: 3.70
 - Timeliness of response: 3.59
 - Most contacted the Deed Restrictions/Residential Design Review Committee
 - Many contact the Staff member by telephone

In Past 2 Years, Have Had Personal Communication with Member of Associations' Staff



Q26. Closed-ended question

Departments Contacted

2008 Resident Survey

THOSE WHO HAD COMMUNICATED WITH A MEMBER OF THE ASSOCIATIONS STAFF	TOTAL SAMPLE (N=267)	Alden Bridge (N=60)	Cochran's Crossing (N=39)	Grogan's Mill (N=46)	Panther Creek (N=39)	Sterling Ridge/ Carlton Woods (N=24)	Indian Springs (N=35)	Harper's Landing/ College Park (N=17)	All Other (N=7)
Deed Restrictions/Residential Design Review/RDRC Committee	28%	20%	36%	20%	36%	38%	29%	41%	0%
Maintenance	12%	12%	10%	17%	5%	13%	20%	0%	0%
Recreation	15%	18%	23%	11%	8%	17%	14%	6%	14%
Don't know/don't remember	16%	22%C	5%	20%C	21%C	17%	9%	18%	29%
Administration	13%	13%	18%	11%	5%	8%	14%	24%	29%

Q27. Closed-ended question

CCR

63

How Communicated

2008 Resident Survey

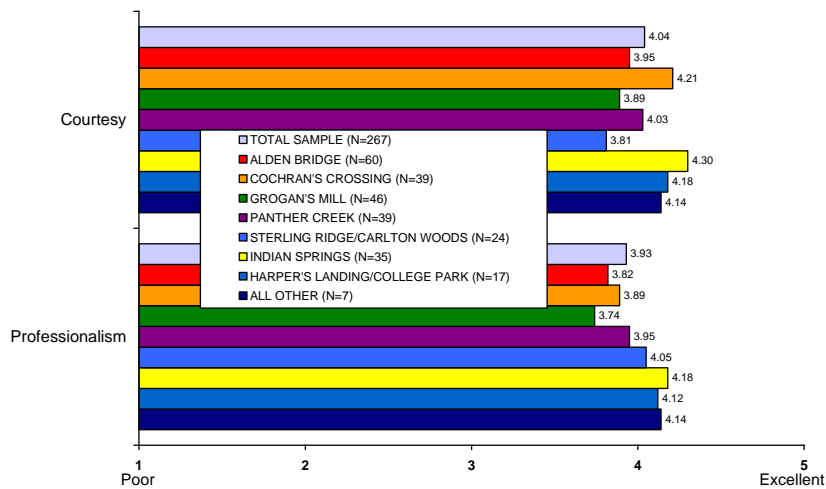
THOSE WHO HAD COMMUNICATED WITH A MEMBER OF THE ASSOCIATION STAFF	TOTAL SAMPLE (N=267)	Alden Bridge (N=60)	Cochran's Crossing (N=39)	Grogan's Mill (N=46)	Panther Creek (N=39)	Sterling Ridge/ Carlton Woods (N=24)	Indian Springs (N=35)	Harper's Landing/ College Park (N=17)	All Other (N=7)
By phone	62%	77%PI	67%	61%	51%	54%	54%	71%	29%
In person	48%	43%	44%	46%	51%	50%	54%	53%	71%
Via e-mail	27%	25%	10%	22%	44%CG	25%	40%C	24%	29%
On the web site	9%	10%	5%	11%	8%	8%	11%	12%	0%
Don't remember/refused	1%	2%	3%	2%	0%	0%	0%	0%	0%

Q28. Closed-ended question

CCR

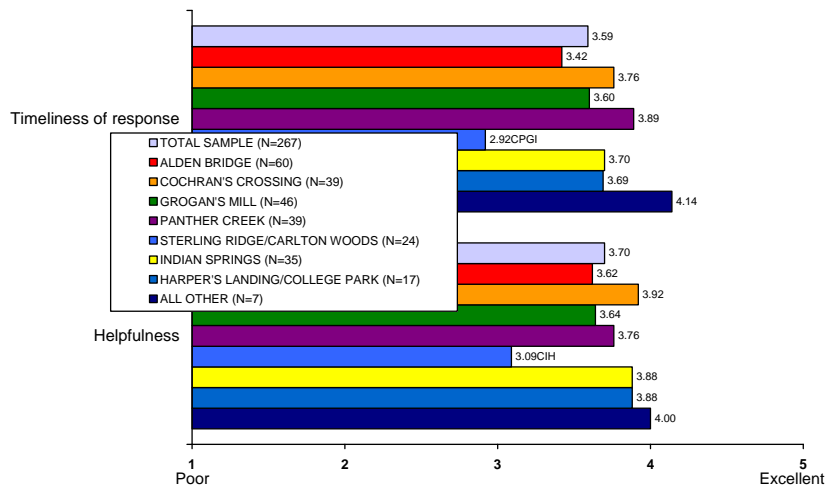
64

Rating Associations' Staff Based on Communication (1 = Poor; 5 = Excellent)



Q29. Closed-ended rating question

Rating Associations' Staff Based on Communication (1 = Poor; 5 = Excellent)



Q29. Closed-ended rating question

Local Governance

Involvement

- Safety and security are the most important services for a Municipal Service Provider to provide
- Residents want local leadership to have law enforcement and home/business maintenance as top priorities
- About half (52%) are satisfied with the current level of input and influence they have in the local government

Most Important for Municipal Service Provider to Provide

2008 Resident Survey

	TOTAL SAMPLE (N=1022)	Alden Bridge (N=214)	Cochran's Crossing (N=170)	Grogan's Mill (N=170)	Panther Creek (N=153)	Sterling Ridge/ Carlton Woods (N=105)	Indian Springs (N=104)	Harper's Landing/ College Park (N=89)	All Other (N=17)
Safety	38%	36%	39%	38%	41%	39%	48%AH	29%	24%
Security	20%	14%CPH	24%	16%	23%	23%	28%GH	16%	18%
Clean environment/neighborhood	13%	14%	14%	9%	8%	12%	16%	16%	24%
Traffic control/flow	11%	9%	14%H	8%	17%AGH	11%	16%AGH	4%	6%
Waste management and garbage pick-up	11%	12%	12%	12%	12%	10%	13%	8%	12%
Deed restriction enforcement	10%	6%PI	8%	11%	14%	9%	13%	10%	0%

Q30. Open-ended question

CCR

69

Satisfaction with Amount of Influence in Local Decision Making

2008 Resident Survey

	TOTAL SAMPLE (N=1022)	Alden Bridge (N=214)	Cochran's Crossing (N=170)	Grogan's Mill (N=170)	Panther Creek (N=153)	Sterling Ridge/ Carlton Woods (N=105)	Indian Springs (N=104)	Harper's Landing/ College Park (N=89)	All Other (N=17)
Very satisfied	16%	16%	21% H	19%	13%	14%	13%	10%	24%
Somewhat satisfied	36%	32%	33%	36%	41%	43%	36%	39%	41%
Neither satisfied nor dissatisfied	26%	26%	30%	25%	24%	23%	27%	27%	12%
Not very satisfied	8%	6%	6%	6%	7%	10%	11%	12%	18%
Not at all satisfied	6%	8%	4%	5%	7%	4%	8%	6%	0%

52% Very/Somewhat satisfied

Q31. Closed-ended

CCR

70

Development

- Many welcome economic development in The Woodlands
 - A majority (80%) say continued economic development is important
 - Almost half state new corporations in The Woodlands creates more benefits than burdens for the area
 - In addition, about one-third state new corporations are great for the area's economy

Importance of Continued Economic Development

	TOTAL SAMPLE (N=1022)	Alden Bridge (N=214)	Cochran's Crossing (N=170)	Grogan's Mill (N=170)	Panther Creek (N=153)	Sterling Ridge/ Carlton Woods (N=105)	Indian Springs (N=104)	Harper's Landing/ College Park (N=89)	All Other (N=17)
Very important	50%	50%	45%	47%	50%	58%CI	43%	58%CI	76%
Somewhat important	30%	29%	35%P	30%	22%	29%	39%PH	26%	18%
Neither important nor unimportant	7%	5%	7%	6%	12%	6%	6%	10%	6%
Not very important	6%	9%	8%H	6%	5%	6%	7%	1%	0%
Not at all important	5%	4%	5%	6%	11%ACSIH	2%	3%	3%	0%

80% Very/Somewhat important

Q32. Closed-ended

Opinion of New Corporations in The Woodlands

2008 Resident Survey

	TOTAL SAMPLE (N=1022)	Alden Bridge (N=214)	Cochran's Crossing (N=170)	Grogan's Mill (N=170)	Panther Creek (N=153)	Sterling Ridge/ Carlton Woods (N=105)	Indian Springs (N=104)	Harper's Landing/ College Park (N=89)	All Other (N=17)
Great for the economy	32%	26%	34%	39%AI	24%CGH	33%	27%	38%A	59%
Creates more burdens than benefits	16%	17%	14%	14%	22%G	16%	16%	13%	12%
Creates more benefits than burdens	46%	50%	46%	42%	46%	43%	49%	45%	24%
No opinion/don't know	6%	7%	6%	5%	8%	8%	8%	3%	6%

Q33. Closed-ended question

CCR

73

Entertainment

2008 Resident Survey

- Most (89%) rate the variety of entertainment in The Woodlands as good to excellent
 - The top mentioned addition residents would like to see is a theater

CCR

74

Rate Variety of Entertainment

	TOTAL SAMPLE (N=1022)	Alden Bridge (N=214)	Cochran's Crossing (N=170)	Grogan's Mill (N=170)	Panther Creek (N=153)	Sterling Ridge/ Carlton Woods (N=105)	Indian Springs (N=104)	Harper's Landing/ College Park (N=89)	All Other (N=17)
Excellent	28%	29%	27%	32%	27%	30%	22%	30%	29%
Very good	38%	39%	39%	27%*	41%	40%	39%	42%	35%
Good	23%	21%	23%	31%ASH	24%	16%	21%	19%	35%
Fair	8%	9%	9%	6%	5%	10%	11%	6%	0%
Poor	1%	1%	2%	1%	0%	3%	3%	0%	0%

66% Very good/Excellent

Q35. Closed-ended

Other Entertainment Venues Would Like in The Woodlands

	TOTAL SAMPLE (N=1022)	Alden Bridge (N=214)	Cochran's Crossing (N=170)	Grogan's Mill (N=170)	Panther Creek (N=153)	Sterling Ridge/ Carlton Woods (N=105)	Indian Springs (N=104)	Harper's Landing/ College Park (N=89)	All Other (N=17)
Theater	18%	17%H	18%H	22%H	21%H	19%H	15%	7%	18%
Museum	4%	2%	7%A	3%	3%	6%	5%	3%	12%
Sports complex/arena/stadium	4%	4%	6%	4%	3%	6%	3%	3%	12%
Don't know	56%	54%	55%	56%	57%	55%	58%	63%	53%

- 2% of Total Sample mentioned each of the following as well:
 - Orchestra/Opera House
 - Cultural Center
 - IMAX
 - Ice skating rink/roller rink
 - Amusement/water park
 - Night clubs
 - More teen activities/teen dance

Q36. Closed-ended question

Other Food Related Stores Would Like in The Woodlands

General Restaurant Genres Mentioned by more than one person

Family-owned restaurants	21
Fancy restaurants	12
Independent restaurants	9
Ethnic restaurants	9
Indian	7
Healthy food	6
Sit-down restaurants	5
Breakfast places	4
Cafes	4
Italian	4
Chinese	3
Bars	3
Buffet	3
BBQ	3

Grocery/Club Stores Mentioned by more than one person

Whole Foods	86
Costco	33
Target SuperCenter	14
Trader Joe's	9
Fiesta	2

Specific Restaurants Mentioned by more than one person

Pappasito's	28
Dairy Queen	19
Applebee's	13
Houston's	8
California Pizza Kitchen	7
Boston Market	6
Ruth's Chris	5
Dunkin Donuts	4
Johnny Carino's	4
Luby's	4
In and Out Burger	3
Whataburger	3
Steak and Shake	3
Sonic	3
Cheddar's	3
Outback Steakhouse	2
BJ's	2
Red Robin	2
Kim Son	2
Maggiano's	2
Panda Express	2
Krispy Kreme	2
Ruby Tuesday	2
Dave and Buster's	2

Q34. Closed-ended question

Other Stores Would Like in The Woodlands

Specific Department Stores Mentioned by more than one person

Nordstrom's	68
Container Store	26
Crate and Barrel	24
Neiman Marcus	12
Saks Fifth Avenue	6
Babies R Us	5
TJ Maxx	5
IKEA	4

Sporting Goods/Hardware Stores Mentioned by more than one person

Ace Hardware	5
REI	4
Bass Pro Shop	3
Academy	2

Miscellaneous Stores Mentioned by more than one person

Theater	4
Auto Parts	2
Dollar Store	2

Q34. Closed-ended question

The Community

Aspects Residents Like about The Woodlands

- The environment/aesthetics is the most beloved aspect of living in The Woodlands
 - This includes greenery, plants, trees, pathways, parks, and cleanliness
 - Other aspects mentioned include:
 - Safety
 - Community/family atmosphere
 - Convenience/amenities

General Areas of Concern

- Areas which residents suggest improvements include:
 - Controlling commercial and residential growth/overpopulation
 - Better law enforcement
- Two in ten name traffic control/flow as the most important issue facing them

Aspects Liked about Living in The Woodlands

	TOTAL SAMPLE (N=1022)	Alden Bridge (N=214)	Cochran's Crossing (N=170)	Grogan's Mill (N=170)	Panther Creek (N=153)	Sterling Ridge/ Carlton Woods (N=105)	Indian Springs (N=104)	Harper's Landing/ College Park (N=89)	All Other (N=17)
Appearance/beauty of area/tree/greenery	41%	43%	41%	49%SIH	39%	37%	36%	31%	53%
Conveniently located to everything	25%	20%	20%	35%ACPS	24%	19%	26%	35%ACS	29%
Safe	23%	28%GP	26%P	18%	15%	29%GP	28%P	22%	18%
Parks/woods/parkways/open spaces	20%	18%	24%I	25%I	19%	22%	13%	21%	12%
Family atmosphere	16%	17%	19%C	12%	18%	10%	16%	21%GS	29%
Nice/friendly neighbors/people	15%	17%	12%	14%	19%	18%	17%	10%	0%
Appearance/aesthetics/neat/clean	15%	12%	18%G	10%	16%	16%	15%	19%G	29%
Quality of life/lifestyle	14%	8%	21%A	14%	16%	14%	14%	12%	29%
Quiet/peaceful	14%	15%S	15%S	14%S	23%SIH	6%	13%	8%	0%
Has everything you need	10%	11%	9%	11%	10%	9%	13%	11%	6%

Suggestions to Improve The Woodlands

2008 Resident Survey

	TOTAL SAMPLE (N=1022)	Alden Bridge (N=214)	Cochran's Crossing (N=170)	Grogan's Mill (N=170)	Panther Creek (N=153)	Sterling Ridge/ Carlton Woods (N=105)	Indian Springs (N=104)	Harper's Landing/ College Park (N=89)	All Other (N=17)
Traffic control	27%	31%C	21%	24%	27%	29%	35%C	15%APSI	35%
Stop cutting down trees	7%	5%	9%	6%	8%	5%	11%A	6%	18%
Slow over-population/too crowded	7%	5%	9%	5%	10%H	6%	7%	3%	6%
Slow construction/commercial businesses	7%	5%	10%	5%	8%	5%	8%	4%	6%
Better law enforcement/lower crime	6%	5%	7%	3%	6%	6%	9%	8%	0%
Don't know	37%	35%	36%	42%	33%	34%	31%	46%	35%

Q38. Open-ended question

CCR

83

Most Important Issues Facing The Woodlands Residents

2008 Resident Survey

	TOTAL SAMPLE (N=1022)	Alden Bridge (N=214)	Cochran's Crossing (N=170)	Grogan's Mill (N=170)	Panther Creek (N=153)	Sterling Ridge/ Carlton Woods (N=105)	Indian Springs (N=104)	Harper's Landing/ College Park (N=89)	All Other (N=17)
Traffic control/flow/congestion	24%	21%	25%	23%	24%	25%	34%AH	18%	18%
New construction/growth/over development	14%	12%	11%	18%	17%	12%	18%	11%	0%
Taxes too high	13%	16%G	11%	8%	16%G	10%	13%	9%	24%
Annexation--opposed to	11%	10%	11%	10%	15%S	7%	10%	10%	18%
Law enforcement/crime/safety	8%	8%	8%	9%	6%	10%	13%	6%	6%
Over population of schools	4%	5%	5%	3%	5%	9%GH	4%	1%	0%
Don't know	21%	20%	18%	22%	16%	24%	14%	30%CPJ	35%

Q39. Open-ended question

CCR

84

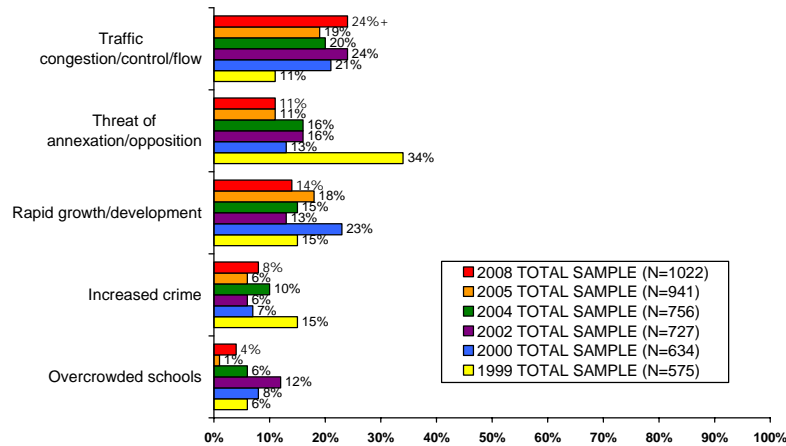
Research Findings - Comparison to Previous Waves

Changes Since Previous Years

- Most Important Issues
 - Traffic flow and congestion concerns rose in 2008 (24%) from 2005 (19%)
 - Levels of other concerns remained consistent such as threat of annexation and rapid development being the next biggest concerns
- Satisfaction
 - In 2008, excellent ratings of the Community Associations' performance increased from 2005

Most Important Issues Facing The Woodlands Residents

2008 Resident Survey



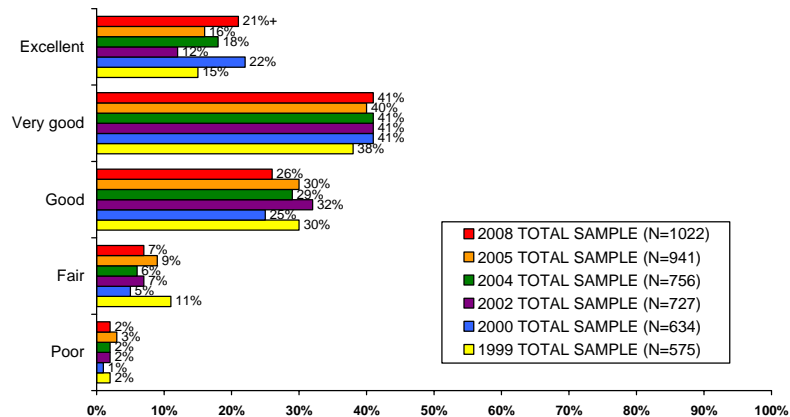
Q46./Q39 Open-ended question

CCR

87

Satisfaction with Services Provided by Community Associations

2008 Resident Survey



Q8. Closed-ended rating question

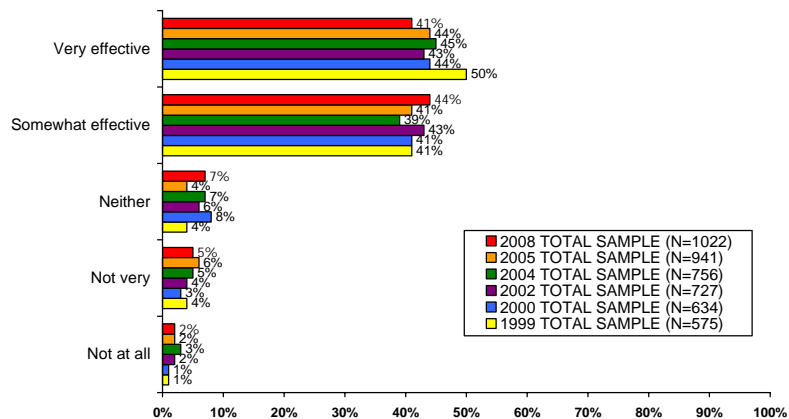
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88

Changes Since Previous Waves

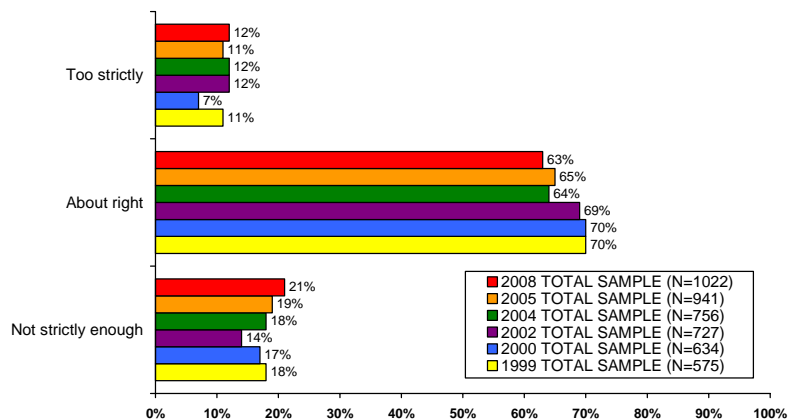
- Deed Restrictions
 - Residents' perception of the Associations' deed restriction enforcement effectiveness remained constant from the previous wave
 - Most residents continue to state that deed restrictions are enforced about right
 - Of those who contacted the Associations to complain, 20% were very satisfied with the Associations' response compared to 28% in the previous wave
 - Twenty-nine percent are not at all satisfied this wave compared to 32% in the previous wave

Effectiveness of Enforcement of Deed Restrictions



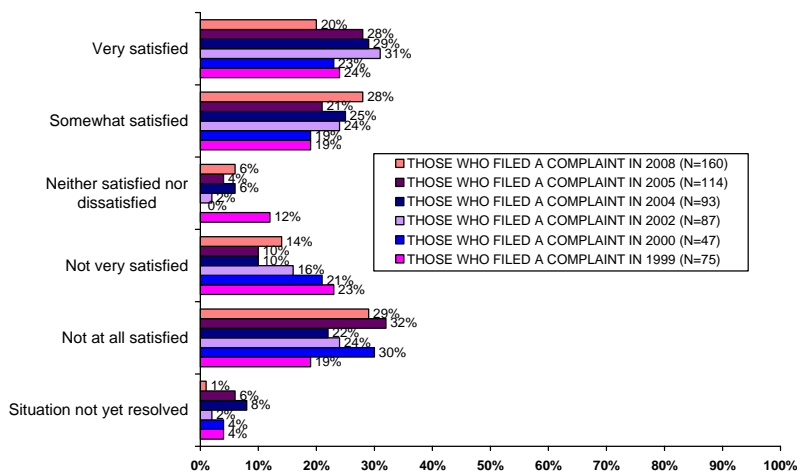
Q16./Q13. Closed-ended

Feel That Deed Restrictions Are Enforced...



Q18./Q15. Closed-ended

Satisfaction with Associations' Response to Complaint Filed



Q20./Q17. Closed-ended

Changes Since Previous Studies

2008 Resident Survey

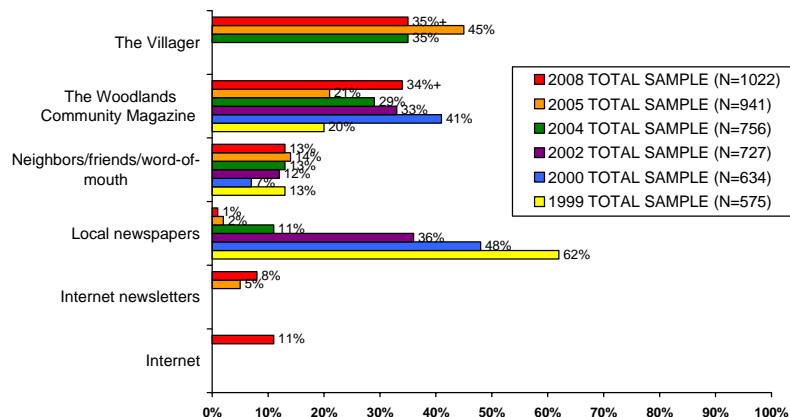
- Communication
 - Usage of The Villager as a source of community activities has slipped to 35% since 2005 (45%)
 - However, use of The Woodlands Community Magazine as a source has increased
 - Most (95%) of respondents continue to report receiving The Woodlands Community Magazine
 - Of those receiving the magazine, 92% read at least some of it
 - Fewer report contacting the Association Staff in this wave
 - Ratings for Associations Staff on courtesy and professionalism improved significantly since 2005
 - Fewer are contacting the RDRC

CCR

93

How Primarily Learn About Activities in Community

2008 Resident Survey



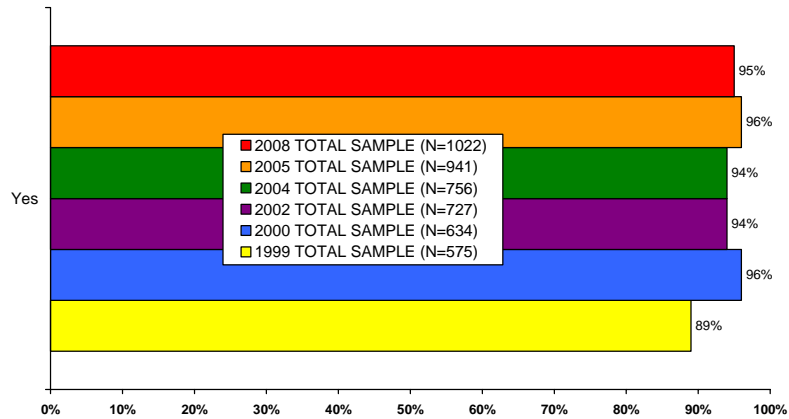
Q23./Q22 Closed-ended question

CCR

94

Receive The Woodlands Community Magazine

2008 Resident Survey



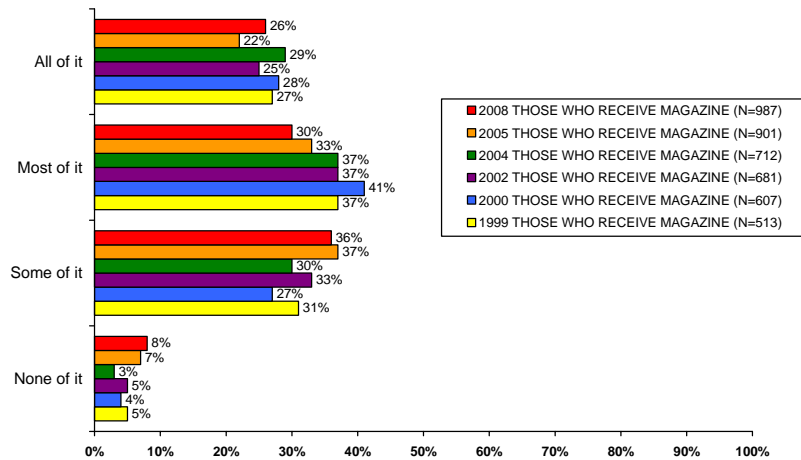
Q24./Q23. Closed-ended question

CCR

95

When Receive Magazine, Typically Read...

2008 Resident Survey



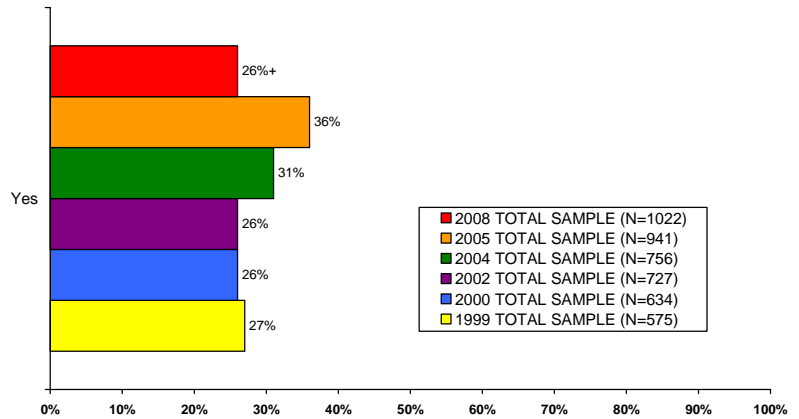
Q25./Q24 Closed-ended question

CCR

96

In Past 5 Years, Have Had Personal Communication With Member of Associations' Staff

2008 Resident Survey



Q35./Q26. Closed-ended question

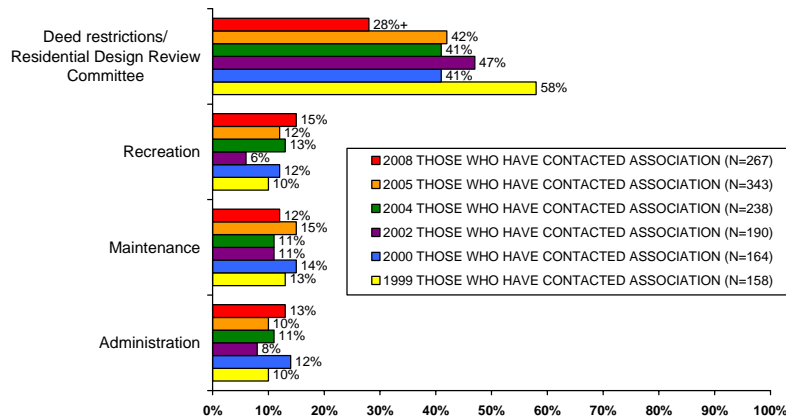
*Note: Previous waves stated past 5 years

CCR

97

Departments Contacted

2008 Resident Survey

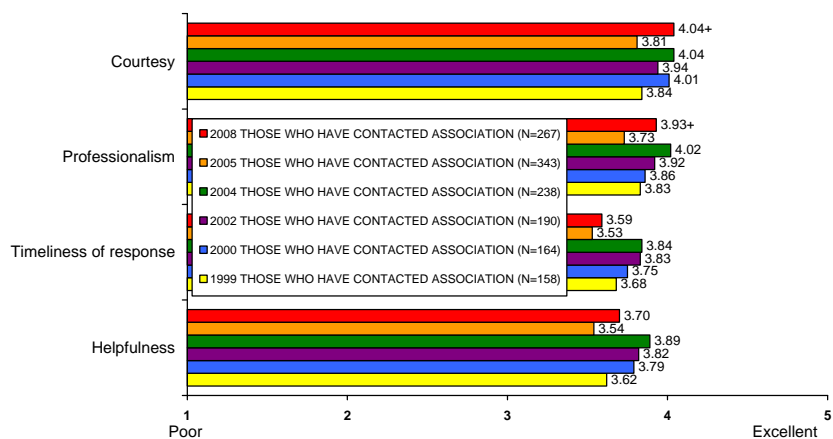


Q36./Q27. Closed-ended question

CCR

98

Rating Association Staff Based on Communication (1 = Poor; 5 = Excellent)



Questionnaire